

Business Objects allows users to automate the delivery of reports in Excel, PDF and text formats at periodic intervals to users' email addresses or Business Objects inbox. The two methods of automation are **schedules** and **publications**.

What is a publication and how is it different than scheduling a report?

While scheduling a report allows you to automate the delivery of one report, publishing a report can run and deliver several different personalized reports at once to different recipients based on different defining characteristics. Instead of scheduling and having one report sent to a list of contacts, publishing allows you to personalize the reports based on defining characteristics in a distribution list (such as Fund Center, Org Unit, Plant, Grant, etc.)

When would I schedule a report?

Scheduling a report gives users the opportunity to set a regular schedule to have a report run and be distributed to a predetermined recipient list. For example, you could set up a schedule for a report to have it automatically run at 11:00 every day. However, scheduled reports lack personalization and each recipient will receive the same report based on the criteria entered into the prompt and the restrictions set at the report level. Reports can be sent in Excel, PDF and text formats.

When would I use a publication?

Any time you need to personalize a report for a recipient based on any field in the report. Any field in the report can be used to personalize it before it is sent to a recipient. You don't need to create many versions of the same report for different Grants, Org Units or Funds Centers. For example, instead of having many versions of a grant report to run separately and send to grant managers, you can set up a distribution list in Excel (like in the image below) to have the report run once for the whole agency and filter it for a field in the report based on an external distribution list loaded in Business Objects before it is sent to recipients:

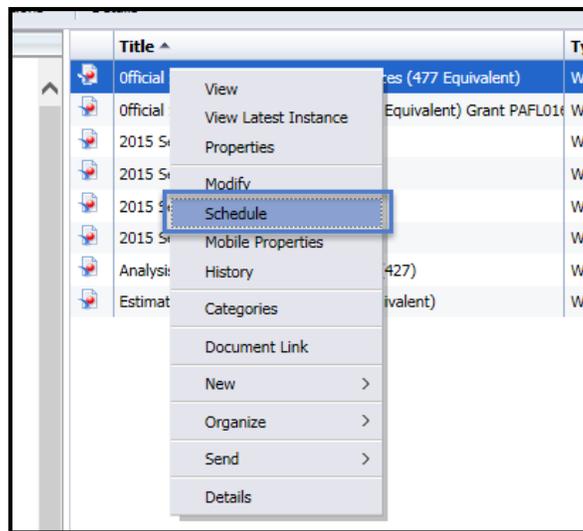
	A	B	C	D
	Recipient ID	Name	Email	Grant
1				
2	1	Cory Hare	cory.hare@admin.sc.gov	D5001BG02314
3	1	Cory Hare	cory.hare@admin.sc.gov	D5001BG02514
4	2	Kelly Hess	kelly.hess@admin.sc.gov	D5001BG02615
5	3	Eric Harvey	eric.harvey@admin.sc.gov	D5001CSBGR14
6				

How to Schedule a Report:

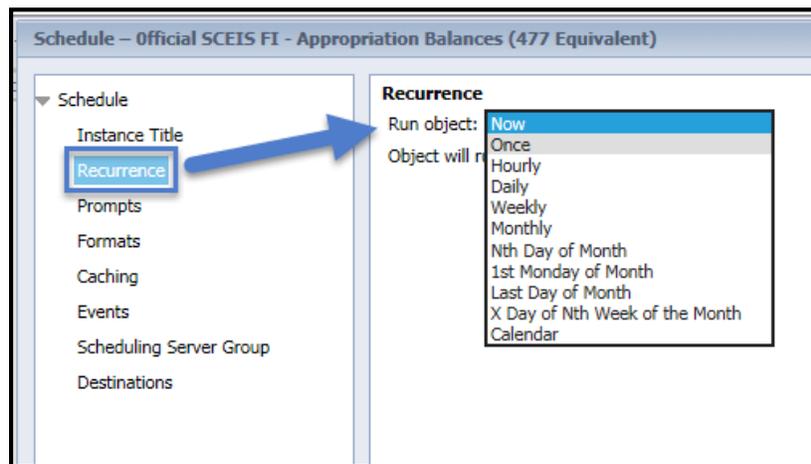
Note: When scheduling a report, there are four basic properties to be mindful of:

1. Recurrence (when and how often the report will run)
2. Format (the output format)
3. Prompts (the prompt parameters that the report will run for)
4. Destination (Email information)

1. Right-click on the document that you would like to schedule and choose **Schedule**.



2. Choose the **Recurrence** of the report by changing the properties on the **Recurrence** tab.



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- Go to **Prompts** and choose the prompt parameters for which the report should run. **Note:** All subsequent report recurrences will be run based on the saved prompt selections unless the properties of the prompts are changed.

The screenshot shows the 'Prompts' configuration window for a report titled 'Schedule - Official SCEIS FI - Appropriation Balances (477 Equivalent)'. The left sidebar has 'Prompts' selected and highlighted with a blue box. A blue arrow points from this box to the 'Prompts' section on the right. The right section contains a table of prompt parameters and their values.

Prompts values for: Official SCEIS FI - Appropriation Balances (477 Equivalent)		
Fiscal Year (Single Value - Required)		2016
Posting Period		16
Business Area	(optional)	no value has been selected yet, this filter will be ignored
Funds Center	(optional)	no value has been selected yet, this filter will be ignored
Fund	(optional)	no value has been selected yet, this filter will be ignored
Functional area	(optional)	no value has been selected yet, this filter will be ignored
Agency Appropriation	(optional)	no value has been selected yet, this filter will be ignored
State Appropriation	(optional)	no value has been selected yet, this filter will be ignored
Grant Number Selection	(optional)	no value has been selected yet, this filter will be ignored
Commitment Item Hierarchy	(optional)	no value has been selected yet, this filter will be ignored
Non Statistical Postings	(optional)	#
GAAP Fund Code	(optional)	no value has been selected yet, this filter will be ignored
GAAP Z Indicator	(optional)	no value has been selected yet, this filter will be ignored
GAAP Budget Code	(optional)	no value has been selected yet, this filter will be ignored

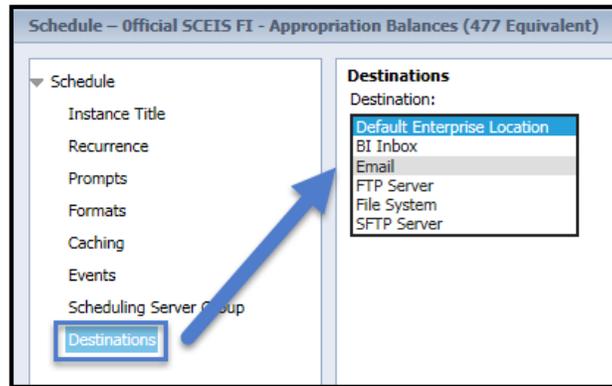
- Go to **Formats** and choose the desired format of the report output:

The screenshot shows the 'Formats' configuration window for the same report. The left sidebar has 'Formats' selected and highlighted with a blue box. A blue arrow points from this box to the 'Formats' section on the right. The right section shows a list of output formats with checkboxes.

Formats	
Output Format	
<input type="checkbox"/>	Web Intelligence
<input checked="" type="checkbox"/>	Microsoft Excel
<input type="checkbox"/>	Adobe Acrobat
<input type="checkbox"/>	Comma Separated Values(CSV)
<input type="checkbox"/>	Plain Text

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5. Go to **Destinations** and choose Email from Destination dropdown:



- Enter bi.bobj@admin.sc.gov in the **From** field of the **Destinations** options.
- Enter the email addresses of the report recipients.
- Choose a name for the subject of the email or use a placeholder. Note: Placeholders are variables that will input different information in the displayed area. Choosing **Title** in the placeholder dropdown will insert **%SI Name%** in the field which will insert the name of the report document in the subject of the email.



- Enter any information that you would like to display in the body of the email.

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- e. Choose a name for the attachment of the email (this will be the report) using the placeholder dropdown. Ensure that **Add File Extension** is checked.

The screenshot shows an email configuration interface. At the top, there are fields for 'BCC:', 'Subject:', and 'Message:'. The 'Subject:' field contains the placeholder '%SI_NAME%' and has an 'Add Placeholder' dropdown menu. Below the 'Message:' field is another 'Add Placeholder' dropdown menu. The 'Add Attachment' section is checked and includes a 'File Name:' field. Two radio buttons are present: 'Use Automatically Generated Name' (unselected) and 'Use Specific Name' (selected). The 'Use Specific Name' field contains '%SI_NAME%' and has an 'Add Placeholder' dropdown menu open, showing a list of options: Title, ID, Owner, DateTime, Email Address, User Full Name, and File Extension. A blue arrow points to the 'Add Placeholder' dropdown menu. The 'Add File Extension' checkbox is checked, and the 'Enable SSL' checkbox is unchecked.

6. Then chose **Schedule** to schedule the report.

Viewing the Report History and Making Changes to the Schedule

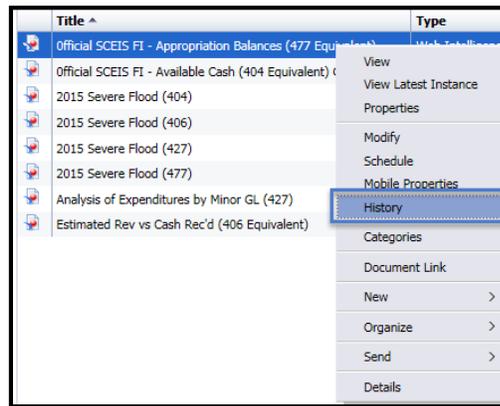
Previous report outputs are called **instances**. You can view all previous instances of a report or make changes to the schedule by going to the **Report History** (for example, to change or add an email address or to change the prompt selections).

In the **Documents** tab, you can see how many times a scheduled report has run and when the last time it was run here:

Title ^	Type	Last Run	Instances
Official SCEIS FI - Appropriation Balances (477 Equivalent)	Web Intelligence	Dec 11, 2015 2:15 PM	8

To View the History of a Document:

1. Right-click on the document and choose **History**.



2. The **History** window will then open and show a list of successful, failed, and recurring instances. Recurring instances run each time the report is set to be refreshed and delivered. To change details regarding your scheduled report, you must change the recurring instance. In this view, you can see the parameters for the instance, the format of the instance, who created the instance, the status, the title and the time.

Instance Time	Title	Status	Created By	Type	Parameters
Feb 22, 2016 4:43 PM	Official SCEIS FI - Appropriation Balances (477 Equi	Success	CHARE	Microsoft Excel	2016;16;DEPARTMENT OF ADMINISTRATION;#
Feb 22, 2016 4:42 PM	Official SCEIS FI - Appropriation Balances (477 Equi	Recurring	CHARE	Microsoft Excel	2016;16;DEPARTMENT OF ADMINISTRATION;#
Dec 11, 2015 2:15 PM	Official SCEIS FI - Appropriation Balances (477 Equi	Success	CHARE	Microsoft Excel	2016;6;#
Dec 11, 2015 2:07 PM	Official SCEIS FI - Appropriation Balances (477 Equi	Failed	CHARE	Microsoft Excel	2016;16;#
Dec 11, 2015 1:58 PM	Official SCEIS FI - Appropriation Balances (477 Equi	Failed	CHARE	Microsoft Excel	2016;16;#
Dec 8, 2015 3:45 PM	Official SCEIS FI - Appropriation Balances (477 Equi	Success	CHARE	Microsoft Excel	2016;16;#
Dec 8, 2015 3:34 PM	Official SCEIS FI - Appropriation Balances (477 Equi	Success	CHARE	Microsoft Excel	2016;16;#
Dec 8, 2015 9:22 AM	Official SCEIS FI - Appropriation Balances (477 Equi	Success	CHARE	Microsoft Excel	2016;16;#
Dec 4, 2015 11:44 AM	Official SCEIS FI - Appropriation Balances (477 Equi	Success	CHARE	Microsoft Excel	2016;16;#
Dec 4, 2015 10:55 AM	Official SCEIS FI - Appropriation Balances (477 Equi	Success	CHARE	Microsoft Excel	2016;16;#

3. You can view previous instances by clicking on the **Instance Time** hyperlink.

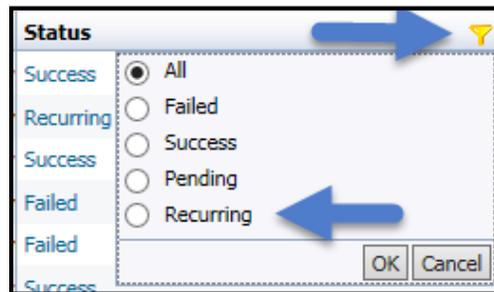
To Change the properties of a scheduled document:

You can change the prompts, recurrence, format or who a document is sent to by changing the properties of the **recurring** instance

1. Right-click on the document and go to **History**.
2. Go to the **recurring** instance.

Instance Time	Title	Status
Feb 22, 2016 4:43 PM	Official SCEIS FI - Appropriation Balances (477 Equi	Success
Feb 22, 2016 4:42 PM	Official SCEIS FI - Appropriation Balances (477 Equi	Recurring
Dec 11, 2015 2:15 PM	Official SCEIS FI - Appropriation Balances (477 Equi	Success

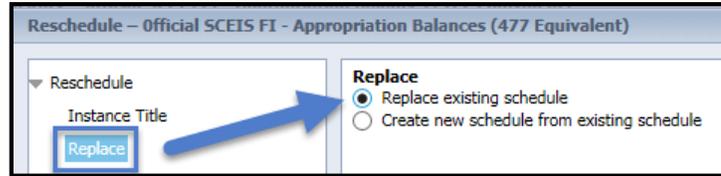
Note: If there are many instances, you can use the filter button in the status column header to quickly find the recurring instance.



3. Right-click on the **recurring** instance and choose the **Reschedule** option

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4. To **replace** a recurring instance with a new one, go to the **Replace** area and choose the **replace existing schedule option**.



Note: If you do not **Replace** the recurring instance, you will create another recurring instance of the report. For example, if you wanted to add an email recipient and rescheduled a recurring instance without replacing it, you would receive an additional run of the report with the modified recipient list.

5. After you have chosen to replace or create a new schedule, you may also choose to update any other settings of the report.
6. Click **Schedule** in the bottom right corner.

Publications:

By using a publication you can personalize (restrict or filter) a report based on criteria using a distribution list (such as an Excel file). A distribution list creates a framework which the report uses to filter and send the appropriate portion of the report.

The basic steps are:

1. Set up your distribution list
2. Load it into Business Objects
3. Create a document with your recipient information
4. Create a publication that links the source report and recipients document
5. Personalize the properties of your report
6. Schedule

Setting up your distribution list:

Each distribution should have a recipient ID (A report and email will be generated for each unique recipient ID), name, email and field characteristic to restrict it by. Here's an example:

	A	B	C	D
	Recipient ID	Name	Email	Grant
1	1	Cory Hare	cory.hare@admin.sc.gov	D5001BG02314
2	1	Cory Hare	cory.hare@admin.sc.gov	D5001BG02514
3	2	Kelly Hess	kelly.hess@admin.sc.gov	D5001BG02615
4	3	Eric Harvey	eric.harvey@admin.sc.gov	D5001CSBGR14
5				
6				

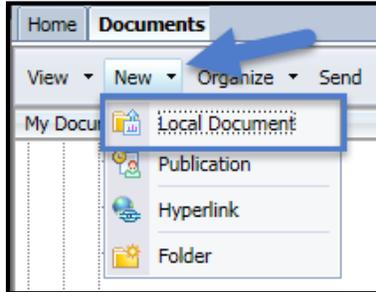
In the example above, Cory would receive one report for Grants D5001BG02314 and D5001BG02514. If you wanted to send Cory separate emails with separate reports for each grant, you would use a different recipient ID for each grant like:

	A	B	C	D
	Recipient ID	Name	Email	Grant
1	1	Cory Hare	cory.hare@admin.sc.gov	D5001BG02314
2	2	Cory Hare	cory.hare@admin.sc.gov	D5001BG02514
3	3	Kelly Hess	kelly.hess@admin.sc.gov	D5001BG02615
4	4	Eric Harvey	eric.harvey@admin.sc.gov	D5001CSBGR14
5				

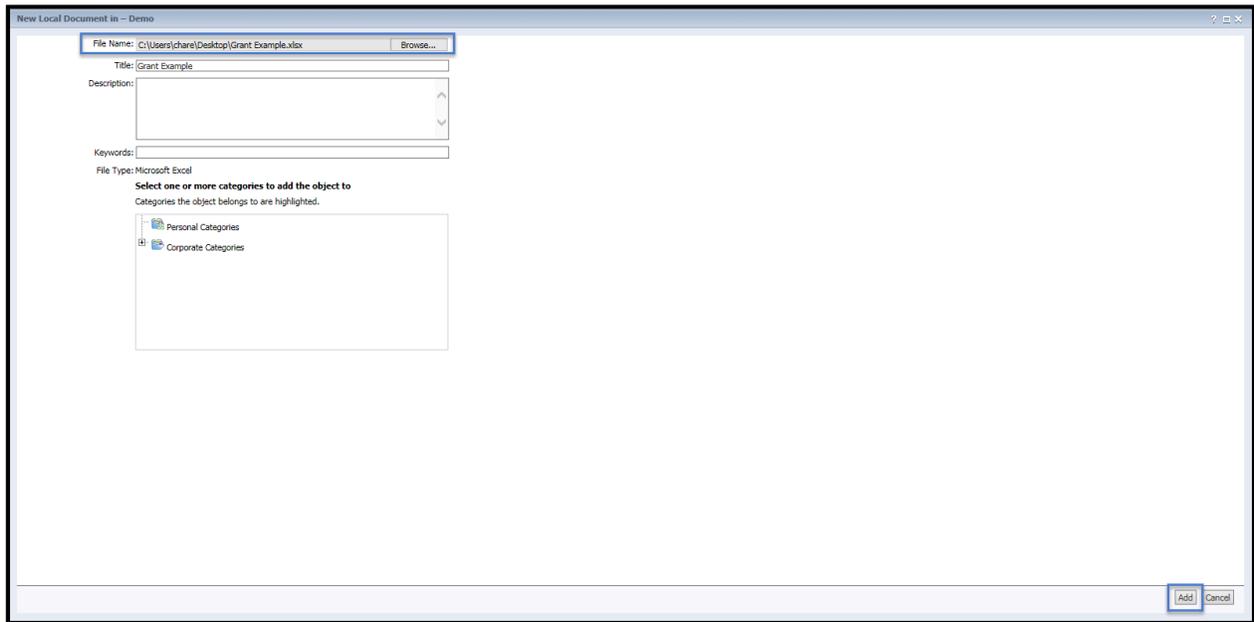
Once the distribution list is set-up in Excel, you'll then need to import it to Business Objects.

Importing an Excel file into Business Objects:

1. Choose the folder that you'd like to place it and click **New** and **Local Document**.



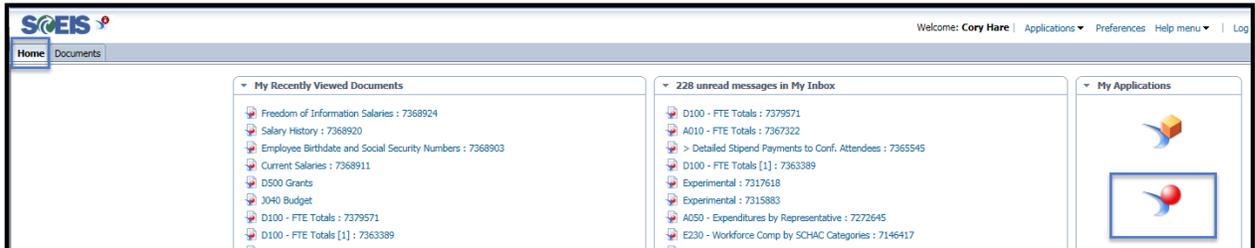
2. Browse for the file on your computer and **Add** it.



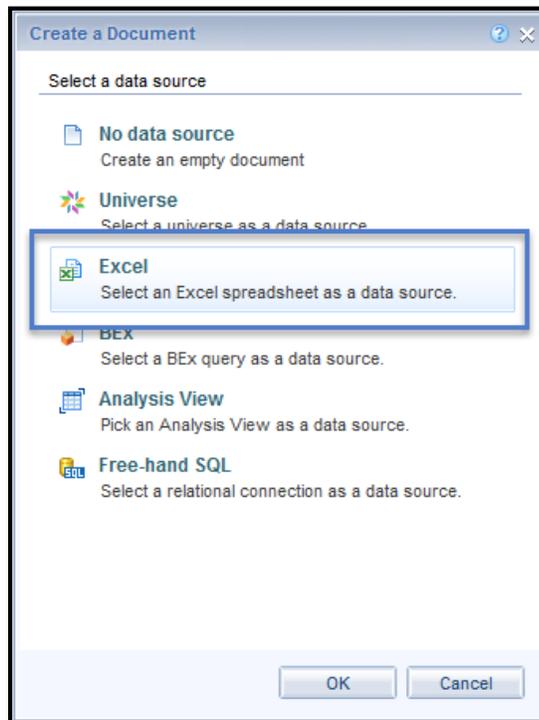
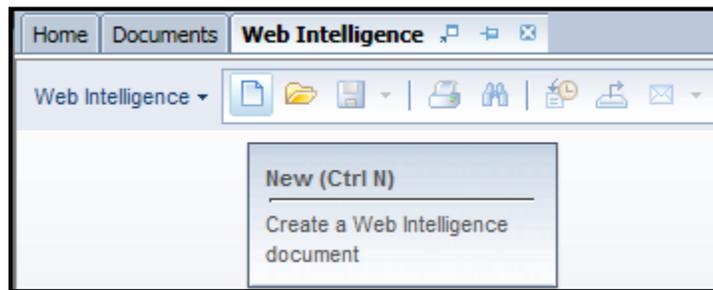
To create a report from your Excel distribution list:

In order to link your distribution list to your source report using a Publication, you'll need to create a report with just your recipient information. To do that:

1. Click the **Web Intelligence** button on the Home Tab.



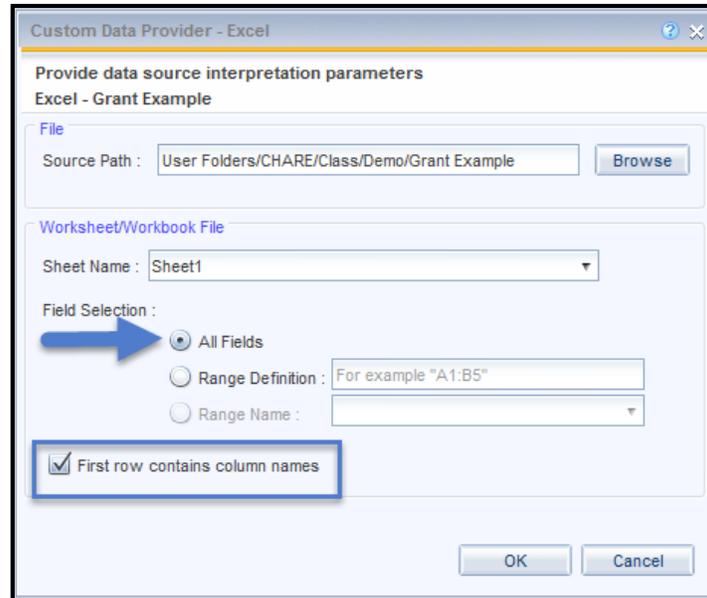
2. Click the **New** button and choose your Excel data provider.



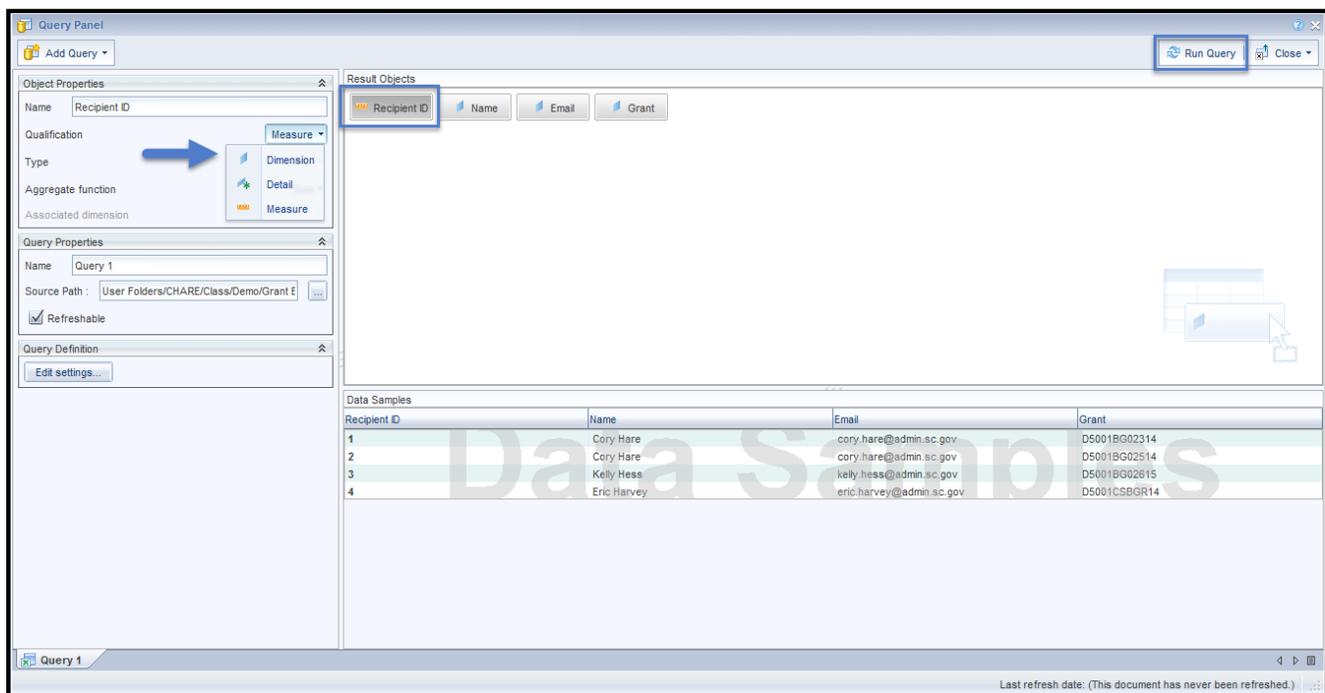
3. Locate the local document that you just loaded and open it.

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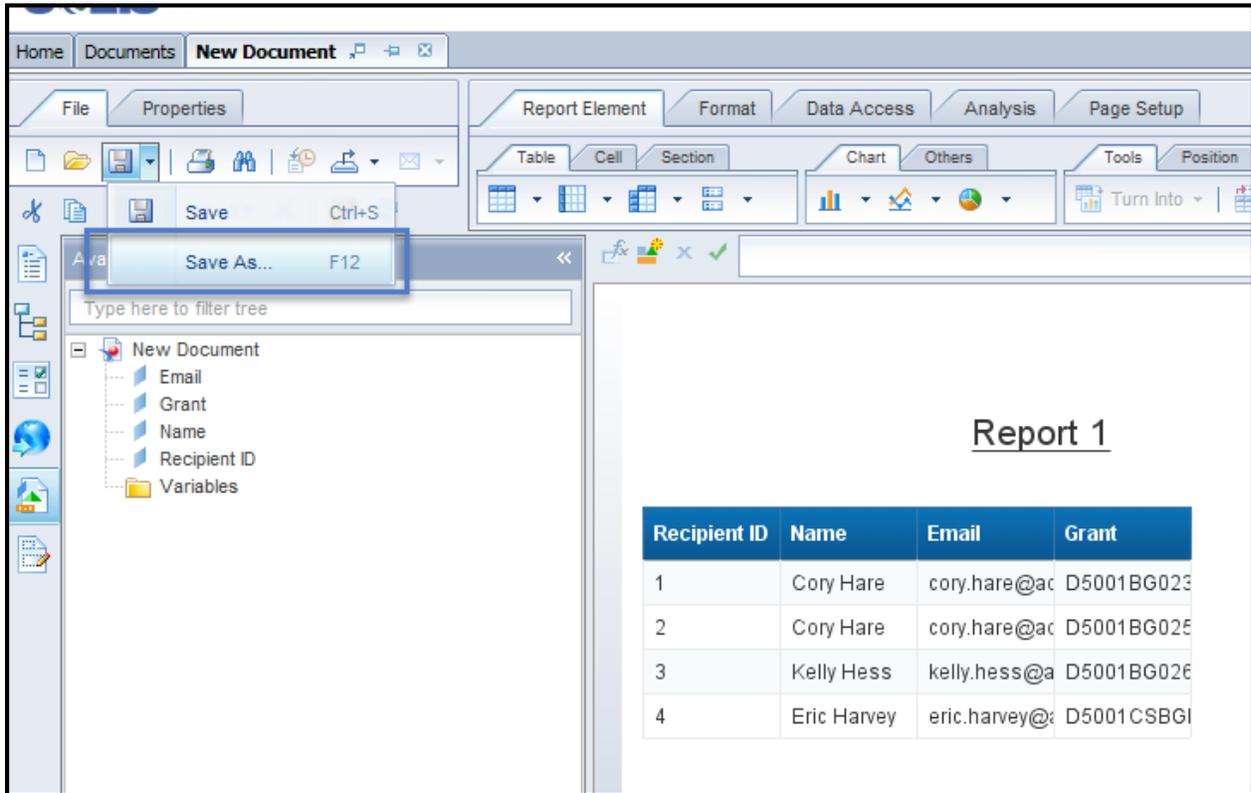
- When the initial data provider dialogue box appears, ensure that **First row contains column names** is selected and choose **OK**.



- The Query Panel will then open. Change all fields to dimensions and strings by clicking on them and changing the properties in the **Objects Properties** panel and **Run Query**.



6. Once the report runs, you'll see a table with your contact information. Save the report and close it.



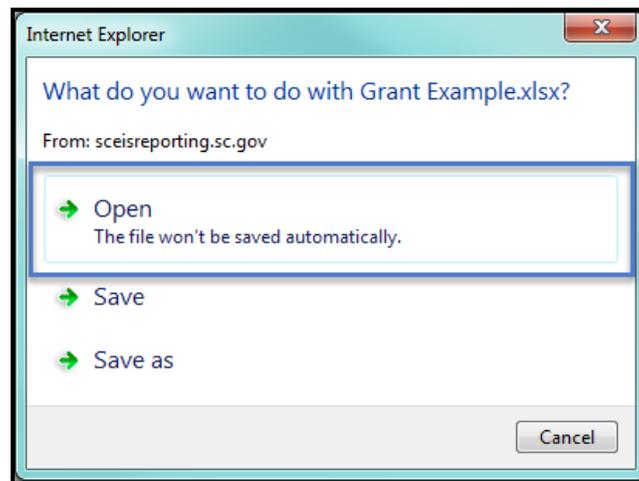
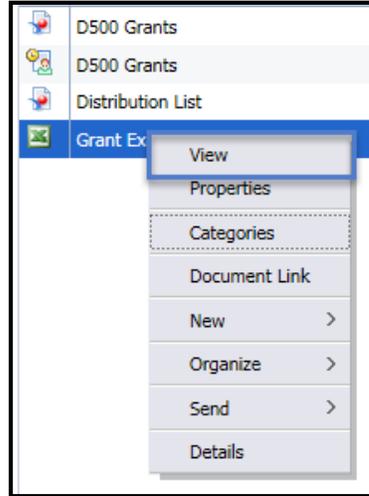
7. You should now have a source document (the report), an Excel file with the contact information, and a document that contains just the contact information:

Title	Type
D500 Grants	Web Intelligence
Distribution List	Web Intelligence
Grant Example	Microsoft Excel

Three blue numbered callouts (1, 2, 3) are overlaid on the table, pointing to the 'D500 Grants', 'Distribution List', and 'Grant Example' rows respectively.

To updating the Distribution List:

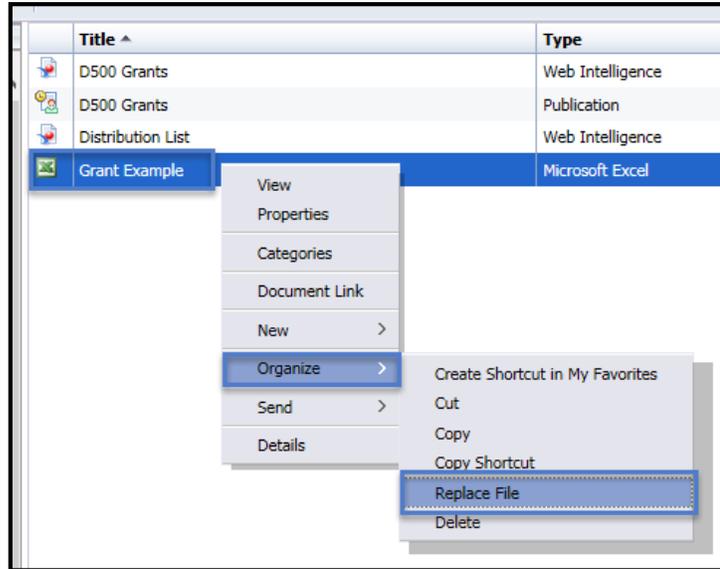
1. Find the Excel file that you have on your machine or open the file from Business Objects by right-clicking on the file and choosing **View**. A pop-up box will appear and you can open the file.



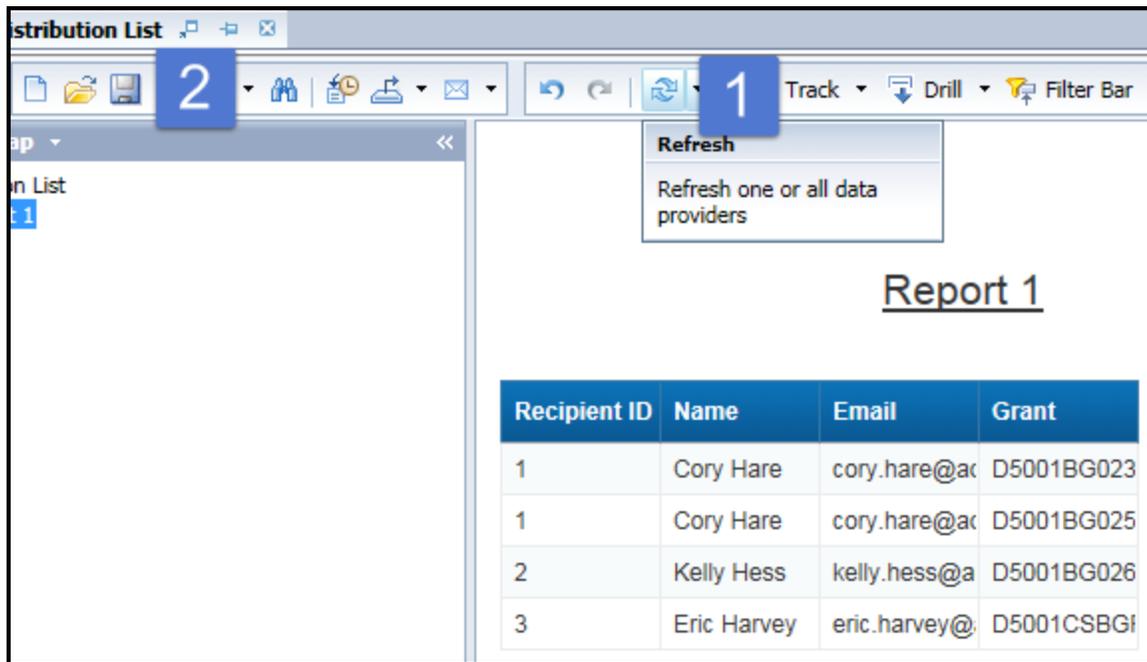
2. Once you open the file, you can make any necessary changes and save it to a location on your machine.

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- Then, right-click on the file in Business Objects and replace the file. A box will appear and you can browse for the file and select it. This will overwrite the old file.



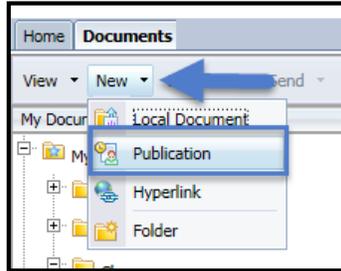
- Once the file has been overwritten, open the report (right-click and **View**) that uses the recipient information, refresh the report and save it.



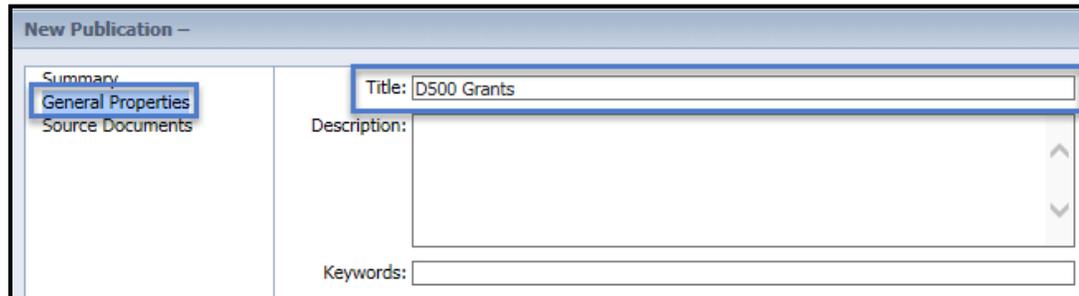
- Your distribution list has now been updated. You will not need to make any changes to the Publication.

Creating the Publication:

1. Click **New** and choose **Publication**.

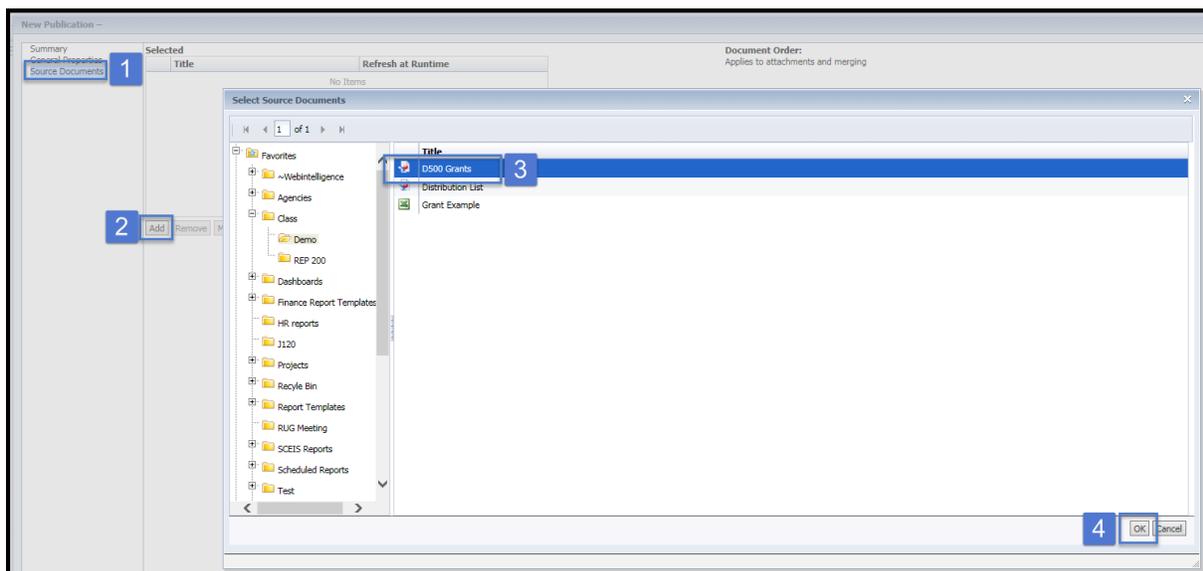


2. Create a **Title** for your publication.



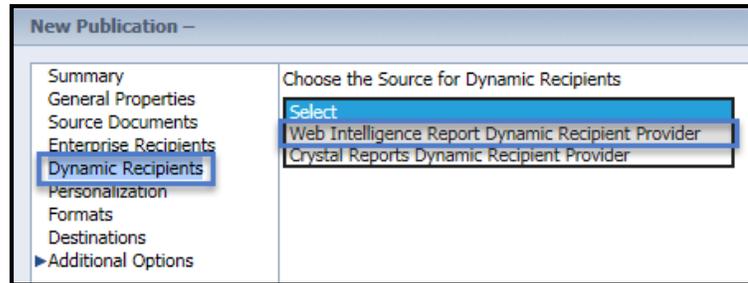
3. Add your **Source Documents** by going to the Source Documents area and clicking **Add**, browsing for the document and choosing OK.

Note: You can add several documents to one publication and have them run simultaneously and personalized for the same criteria on the distribution list.

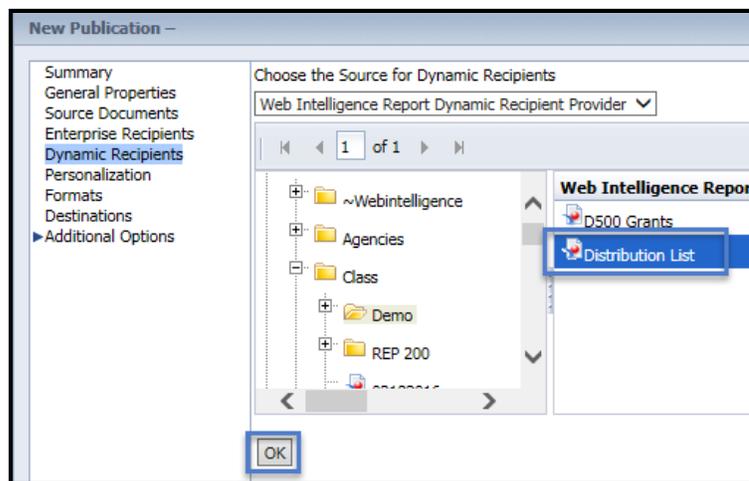


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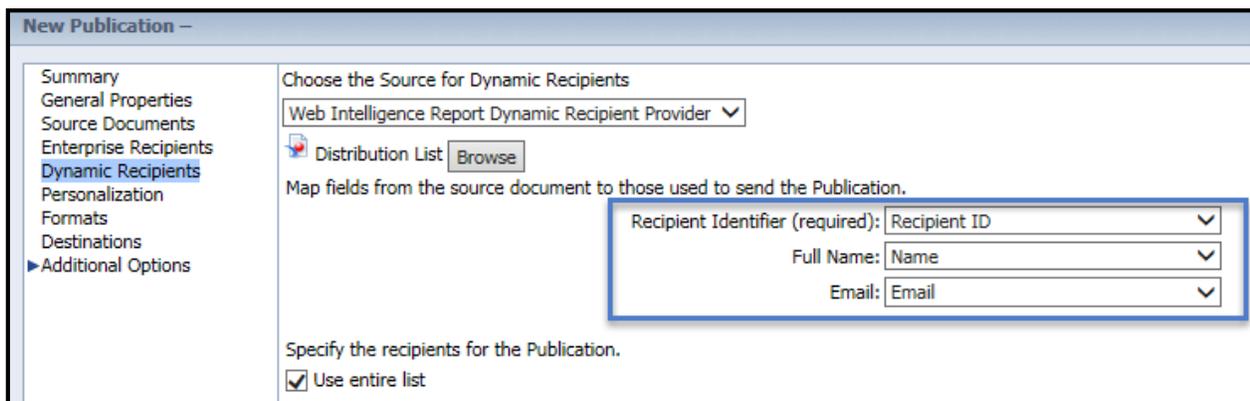
- Go to **Dynamic Recipients** and choose **Web Intelligence Report Dynamic Recipient Provider**. This is the report that you created based on the Excel file.



- Browse for the Distribution list that was created from the Excel file, select it and click **OK**.

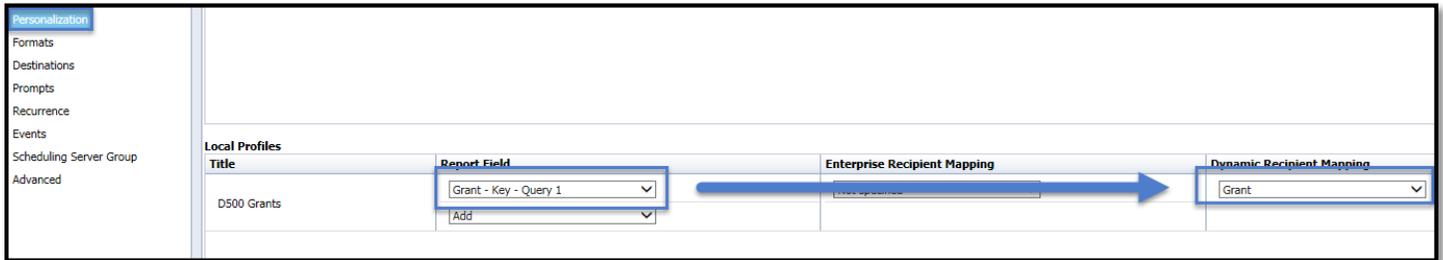


- Choose the data source (which should be **Query 1**) and you should then see options to map the fields from the distribution list to the publication. Then, set the **Recipient ID** to be mapped to the **Recipient ID** field in the report, the **Full Name** to the **Name** column in the report and **Email** to the **Email** field in the Report

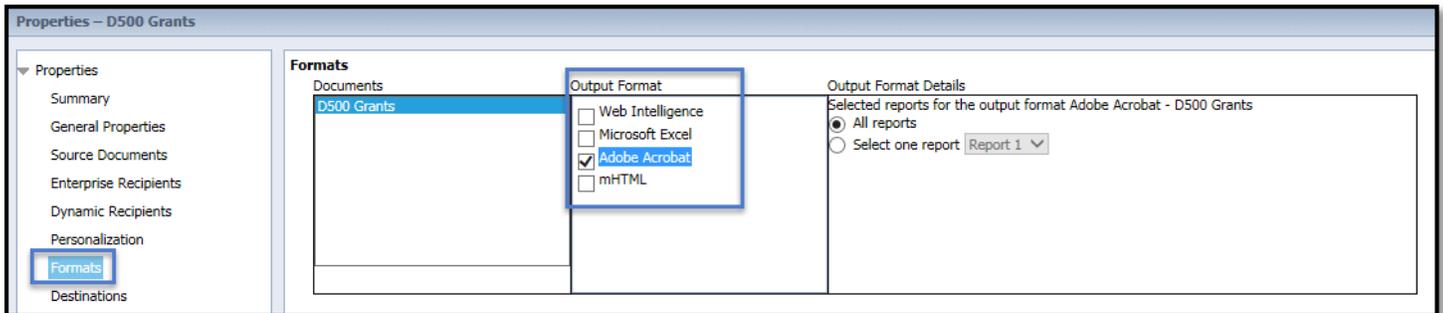


- After the dynamic recipient fields have been mapped, go to **Personalization** and map the related fields in the report to the distribution list. (In this example, it will be the Grant Key from the source report and the Grant field from the distribution list.

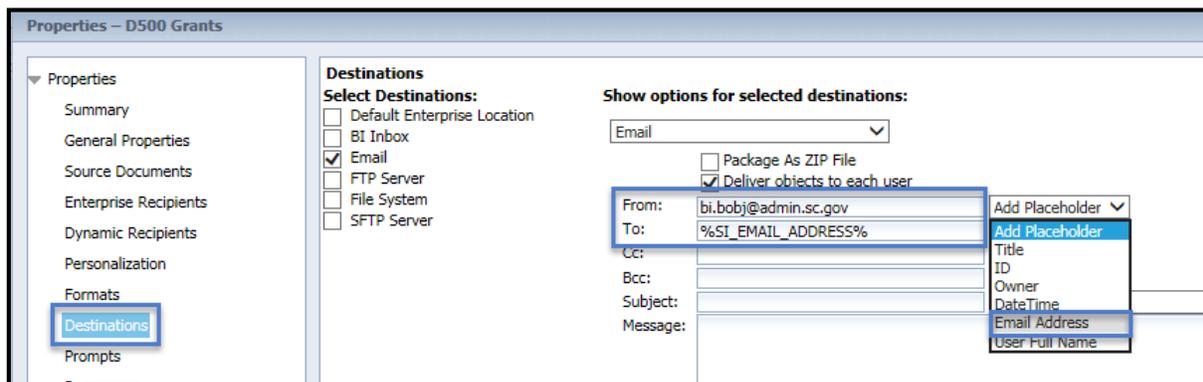
Note: If you have multiple source reports or multiple queries within one document, you'll need to map each field to the same field in the distribution list.



- Go to the **Formats** tab and choose the desired output format of the report.



- Go to the **Destinations** tab and choose **Email** as the selected Destination. Then, enter bi.bobj@admin.sc.gov in the **From** field. **%SI_Email_Address%** should be the default value in the **To** field. If not, use the placeholder to insert it into the **To** field.



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10. In the subject area, you can enter whatever the subject of the email should be. Alternatively, you can use a placeholder that will use the title of Publication.

The screenshot shows an email configuration form. The 'Subject' field contains the placeholder '%SI_NAME%'. A dropdown menu is open, showing options to 'Add Placeholder' and a list of available placeholders: Title, ID, Owner, DateTime, Email Address, User Full Name, %Grant - Key - Query 1-NAME%, and %Grant - Key - Query 1-VALUE%. Below the subject field, there is a section for 'Add Attachment' with options for 'File Name' (Use Automatically Generated Name or Use Specific Name) and 'Add File Extension'.

11. You can then choose a specific name for the email attachment (report) by manually inputting the desired values or using a placeholder that will use the title of the source document.

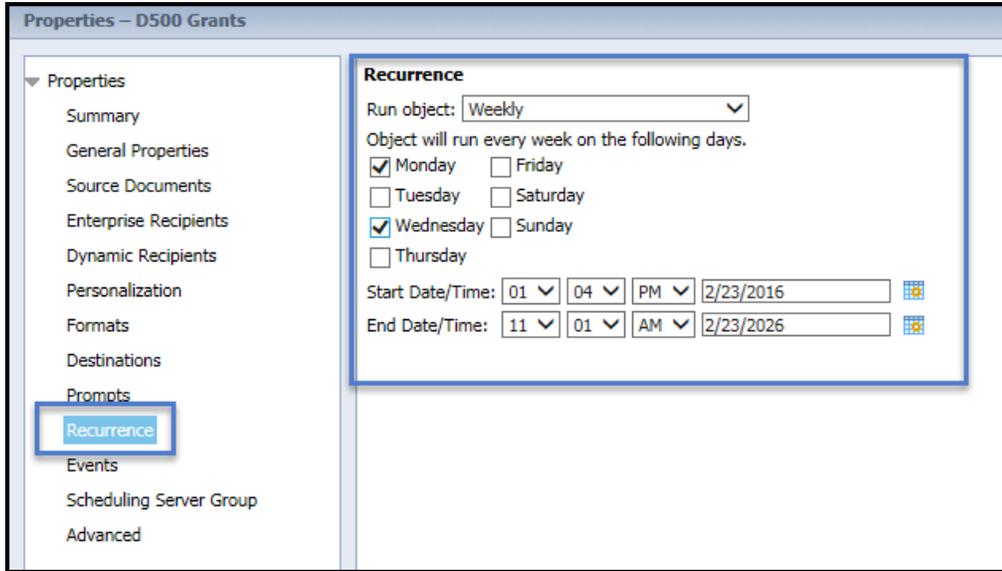
This screenshot focuses on the 'Add Attachment' section. The 'File Name' dropdown menu is open, showing a list of placeholders including Title, ID, Owner, DateTime, Email Address, User Full Name, File Extension, Document Name, %Grant - Key - Query 1-NAME%, and %Grant - Key - Query 1-VALUE%.

12. After the Destination properties have been set, go to the **Prompts** tab and modify the prompts for the criteria that the report should be run for.

The screenshot shows the 'Properties - D500 Grants' dialog box. The 'Prompts' tab is selected, displaying a list of criteria and their corresponding values. The criteria include Fiscal Year, Posting Period, Business Area, Funds Center, Fund, Functional area, Agency Appropriation, State Appropriation, Grant Number Selection, Commitment Item Hierarchy, Non-Statistical Postings, GAAP Fund Code, GAAP Z Indicator, and GAAP Budget Code. Each criterion has a value and a note indicating whether it has been selected or ignored.

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13. Go to the **Recurrence** tab and choose when and how often you'd like the report to run. **Note:** The **Start Date/Time** will determine the time of day that the report is sent out.



The screenshot shows the 'Properties - D500 Grants' window. On the left is a navigation pane with the following items: Properties, Summary, General Properties, Source Documents, Enterprise Recipients, Dynamic Recipients, Personalization, Formats, Destinations, Prompts, **Recurrence** (highlighted with a blue box), Events, Scheduling Server Group, and Advanced. The main area is titled 'Recurrence' and contains the following settings:

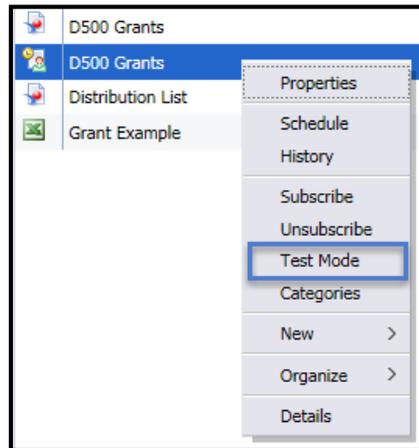
- Run object: Weekly (dropdown menu)
- Object will run every week on the following days.
 - Monday Friday
 - Tuesday Saturday
 - Wednesday Sunday
 - Thursday
- Start Date/Time: 01:04 PM 2/23/2016 (calendar icon)
- End Date/Time: 11:01 AM 2/23/2026 (calendar icon)

14. Once these steps are completed, you can select **OK** bottom right hand corner and you are finished!

To Test a Publication

You can test a publication and have the report outputs emailed to your email address as they would go out to the recipients in your distribution list in order to verify that the publication is working as intended.

1. Right-click on the Publication and chose **Test Mode**.



2. Enter your email address in the **To** field and chose **Test**. The publication will then run and send you emails with reports for each of the recipient IDs that you identified.

You are in test mode.
Test mode allows you to send a publication to yourself as the publisher in order to validate a publication before sending to its genuine recipients. You will receive the same information as if it was sent to the recipient. You can change the recipients to be a smaller group of users, and the destinations are automatically updated to make you the recipient of a publication viewed within the system, or your email address is used as opposed to the recipients email address. You must modify other destinations manually.

Email recipients
To: cory.hare@admin.sc.X
Enterprise Recipients

Available
Find Title []

Title	Full Name
AAR86727	AARON NEWTON
ABH84243	ABHIJIT DESHPANDE
ABR17476	
ADA14082	
ADA38256	
ADA54796	
Administrator	
ADR72596	ADRIANA DAY
AFI093755	AFIYAA FICKLING
AFT69797	
AGARRETT	ADAM GARRETT
AGRIFFIN	Anjali Griffin
AKI83991	AKIKO OHTSU
AKIMPSON	

Show: Selected and Excluded

Selected
1 of 1

Title	Full Name
No Items	

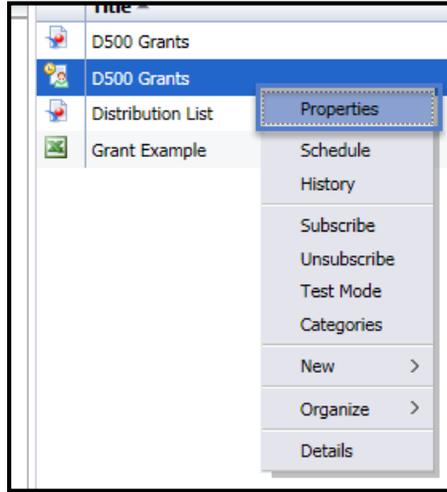
Excluded
1 of 1

Title	Full Name
No Items	

Test **Cancel**

To Change the Properties of a Publication

1. Right-click on the publication and choose **Properties**.



2. Make changes to the prompts, recurrence, or any other settings and choose **OK** in the bottom right hand corner.